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ABSTRACT

This six-chapter guide suggests a new approach to describing the knowledge, competencies, and managerial roles inherent in planning effective conferences and institutes. Chapter 1 introduces the many roles of the conferences and institutes program planner and discusses program formats and what makes conference programs unique learning events. Chapter 2 explores more traditional planning models, describes effective program planners as a unique blend of manager-educators performing a series of managerial roles, and discusses the two platforms or bases upon which these managerial roles are built: a knowledge base and a competency base. Chapter 3 considers program planners as organizational interpreters who must relate their activities in the planning process to the milieu of internal and external missions, expectations, and limits. Chapter 4 explores the entrepreneurial role of the program planner: organizing, managing, and financial management. Chapter 5 focuses on the program planner as builder of effective relationships on several dimensions--with external publics, internal constituencies, service providers, and various levels of support staff and coworkers. Chapter 6 highlights three themes of the guide that shed light on the roles of the program planner: connection, collaboration, and credibility. (Contains 53 references.) (YLB)

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Blending the Roles of Interpreter, Entrepreneur, Collaborator

A New Model for Conferences and Institutes Program Planners

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The Guide Series
in Continuing Education
A publication prepared by the
University of Illinois at Urbana-Champaign

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Foreword

The successful conferences and institutes program planner performs a variety of important roles, moving continually from one to another as planning progresses. Carolyn Carson Dahl draws on both her own experience and a body of useful literature to identify and describe the many roles that those in program planning play. Specifically, her Guide emphasizes the entrepreneurial and political dimensions of a conference program planner's job, including how the planner represents the institution to a variety of organizations and clients and builds effective relationships while developing a program. The author's new model of conferences and institutes program planning will serve as an excellent reference for all those engaged in this challenging activity.

Charles E. Kozoll
Editor
Guide Series

About the Author

Carolyn Carson Dahl is head of Conferences and Institutes, Office of Continuing Education and Public Service, at the University of Illinois at Urbana-Champaign. She received her B.S. degree in American Studies in 1978 from the University of Southern Mississippi. In 1983 she received the Ed.D. degree in Adult Continuing Education from the University of Georgia. She has had extensive experience in planning conferences, as well as in other types of continuing education programs, at the University of Southern Mississippi; the University of Georgia; Brunswick Junior College, Brunswick, Georgia; and the University of Illinois at Urbana-Champaign.

Dr. Dahl has held many leadership positions with both Region IV and the Conferences and Institutes Division of the National University Continuing Education Association; currently she is serving as the division's immediate past chair.

She has made numerous presentations on conference planning, budgeting and financing noncredit programs, developing internal support for conferences and institutes, adult development, and interpersonal interaction. Her chapter, "Choosing the Best Location for Continuing Education Programs," appears in the *Handbook of Marketing for Continuing Education*, published in 1989 by R. Simerly and Associates.

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Other colleagues have also contributed, over a period of years, to the ideas presented here. Special thanks to: Robert Simerly, the University of Nebraska-Lincoln; Craig Weidemann, University of Maryland-Baltimore County; Barbara Emil, University of Nebraska-Lincoln; and Anne Colgan, University of Colorado. We also wish to thank Michael Ostroski, Jeffrey Sands, and Carol Downs, program directors in the Division of Conferences and Institutes in the Office of Continuing Education and Public Service at the University of Illinois at Urbana-Champaign.

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Chapter 1
The Conferences and Institutes Program Planner: A New Model

- The Society for Professional Achievement is planning its annual meeting. Historically the conference has been promoted with slick brochures, has relied heavily on prepared instructional materials and extensive audio-visual equipment, and has included several elegant social events. The conference program planner has been informed, however, that the registration fee may not exceed a very modest amount.
- The Annual Striving for Excellence Conference is conducted for 1,000 state government employees and is funded through federal appropriation. Client planners want to include a lavish reception rather than a dinner so that participants may eat while still claiming full per diem.
- The local Chamber of Commerce sponsors a one-day seminar called "Strategies for Leading a Full Life in Retirement." The content is well conceived and designed, and the faculty are well known and respected. Despite a broad marketing campaign, only twelve people enroll.

Whether it takes place in the academic, business, industry, health care, or government environment, conference program planning is full of challenges and hazards. Some people find these challenges invigorating, while others describe them as frightening and overwhelming. Just when it seems that all planning is in place, another idiosyncrasy arises and must be accommodated.

Conferences and institutes professionals have historically been considered among the most successful of continuing education practitioners. They have been characterized as aggressive, entrepreneurial, tireless, shrewd, and highly visible in the continuing education profession. In the training of program planners, many approaches have been attempted. But there is little research that illustrates what truly constitutes effective conference program planning.

The Roles of the Conferences and Institutes Program Planner

Whether program planning is a full- or part-time job, individual planners are called upon to play many difficult roles. They may be responsible for creating and directing the planning committee, the budget, the program content, and the promotional brochure, as well as implementing the actual

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event. Suddenly, the planner has become group facilitator, business manager, educator, marketer, and logistics expert all in one.

If the planners were operating in isolation with no outside influences—a one-man show—the broad nature of these roles would be difficult enough. Rarely, however, do planners operate in a vacuum. The very nature of a conference program event implies the efforts of many people.

Preparing Conferences and Institutes Program Planners

Few academic programs specifically prepare individuals to become conference program planners. In fact, most planners become involved by accident. Full-time professionals often choose the work because they have some interest in continuing education and find the noncredit program formats intriguing and challenging. Part-time planners are usually innocently drafted into a process for which they have little time and even less understanding.

Most conference program planners are trained on the job. What literature exists has focused on the step-by-step planning process or on the skills and competencies necessary for program planning. But conference program planning is rarely linear or separable into performance of discrete competencies. At every step of the way, effective program planners perform complex roles that require a blending of steps, skills, insights, and understandings. Simultaneously, planners play the roles of politician, co-worker, interpreter of missions, statesperson, entrepreneur, and administrator. Those roles can be grouped into three categories: interpretational roles, entrepreneurial-administrative roles, and relationship roles, as shown in Figure 1.

The pages that follow suggest a new approach to describing the knowledge, competencies, and strategic roles inherent in effective program

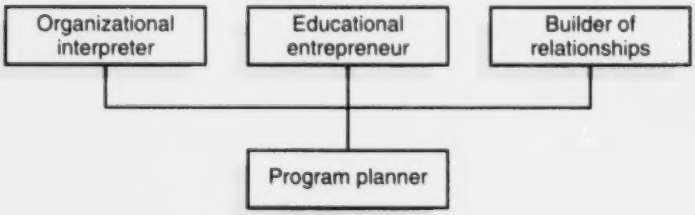

Figure 1. The roles of the conferences and institutes program planner.

planning. To begin, a few words are needed about conferences and institutes program formats and what makes conference programs unique learning events.

The Conference Program as a Unique Learning Event

For the purpose of discussion, a *conference program* will be defined as an educational event bringing people together in a relatively short time frame to address specific issues of mutual interest. This broad definition allows us to include several types of events such as workshops, short courses, seminars, institutes, annual society gatherings, and scholarly meetings. The label attached to the event is not critical here, but rather the fact that such events share some or all of the following characteristics:

1. They are nonroutine events
2. involving many interrelated details,
3. often planned by committees, as well as
4. cosponsored by several groups,
5. and are heavily dependent upon complex factors and "factions" for success.

The term *conference program*, then, will be used broadly to refer to the types of programs that share these characteristics. These characteristics create unique challenges and have implications for the planning process. Conferences and institutes programs take place outside the routine pattern of life (for everyone but the planner). They are full of unanticipated circumstances and are usually carried out in a specific and compressed time frame.

In any situation where conferences and institutes programs are planned, problems occur. Planning committee members neglect to follow through on assignments. Printing and production schedules are not met. Facility personnel neglect to carry out simple requests that have been clearly communicated in advance. Such obstacles hamper both full- and part-time planners. In light of the fact that the planning group is often inexperienced in making decisions about conference programs and that control of the entire planning process is decentralized, it is no wonder that problems develop. Experienced planners learn to anticipate some of the hazards and develop swift coping strategies. Part-time planners, distracted by their normal responsibilities, must be particularly attentive to the natural pitfalls associated with conference program planning.

In addition, conference programs tend to become highly political events. Different individuals have different agendas. For example, in a college setting, one faculty member may be concerned that the program be scholarly in nature. Another faculty member may seek to increase visibility with colleagues outside the institution. The department chair may intend that the program generate additional revenue to offset shrinking travel and equipment budgets. The dean of the college may be hoping to create a vast network of linkages with practicing professionals, business, industry, and government through the dissemination of research and service.

Conference program planners are constantly faced with the challenge of balancing educational goals with economic, political, and practical realities. They proceed through the planning process, step by uneven step, faced with pressing deadlines, complicated by inexperienced planning groups, and overwhelmed by the sheer volume of work necessary to carry out the program. In short, the challenge of conference program planning is "detail driven, error prone, frustration laden, and pressure packed" (C. E. Kozoll, personal communication, 1986).

The Conference Program Planning Group as a Temporary Organization

In essence, the planning of a conference program involves the creation and management of a temporary organization. This organization exists from several months to several years for the purpose of planning, implementing, and evaluating a particular program. When the activity is complete, the specific organization typically disbands.

Not only does the planning group represent a temporary organization, the conference program planner is usually creating and managing a number of such organizations in varying stages of development at a given time. Each of these miniature organizations is operating at a different speed and at a different point in its life cycle. Small wonder that the role of conference program planner has been likened to that of the "plate spinner" at the circus, striving to keep all plates turning in mid-air at the same time (C. E. Kozoll, personal communication, 1987).

Conference program planners are rarely the designated leader of the planning organization. They must manage the group through sheer personal influence and competence, rather than through legitimate authority. This leaves planners with inconsistent control of the process and the product. They may be totally responsible for the product (the success of the program), but only partly in control of the planning process. Moreover, planners must influence individuals unfamiliar with planning programs and are often

caught in the middle. The planning process is at best uneven, if not completely inefficient at times. According to Ilsley:

> Planning a conference is a feat of human engineering because it means coordinating the scores of people who carry out hundreds, even thousands, of tasks. . . . When this is coupled with the fact that conferences mean many things to many people, it becomes clear that there can be no guarantee of conference success. (1985, p. 89)

It is important to note, however, that while the specific planning group for a particular conferences and institutes program may be temporary, the relationships established are often lasting, either serving us well or coming back to haunt us.

Traditional Planning Models

Typically, when we describe conferences and institutes program planning, we focus on task-oriented approaches. We point to such activities as brochure production, budget development, participant registration, facilities, and arrangements. Whether we hire staff members who already have these skills or train them ourselves, these competency areas are essential. Poor attention to some aspect of these details may spell disaster. While vital to program success, however, the task-oriented approach falls short in describing the "magic" worked by good conference program planners.

Effectiveness in planning conference programs results from something more integral and subtle. Why are conference program planners considered among the most successful of continuing education practitioners? What is the essence of good conferences and institutes program planning?

Purpose of This Guide

Conference program planning embodies a unique blend of skill and knowledge areas leading to an effective planning style. This style consists of a set of managerial roles. This Guide asks: "What are the managerial roles that lead to excellence in the planning and administration of conferences and institutes programs?"

Chapter 2
Building on Traditional Bases toward a New Model of Conferences and Institutes Program Planning

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Traditional Perspectives

Before we discuss a new model of conference program planning, it will be helpful to consider the features of more traditional models. The current literature regarding the planning process reflects three approaches (Figure 2). One approach focuses on the *chronology* of the planning process. Such models tend to begin with needs assessment, followed by objective and goal determination, design of the program, location of resources, implementation, and finally evaluation. Chronological models assume that the planning process is more or less linear. But conference program planning bears little resemblance to linearity. How often do program planners scurry to book space months or even years in advance—long before needs have been assessed and goals and objectives determined?

Another approach centers on technical guidance, a "*nuts-and-bolts*," step-by-step, "how-to" focus. Checklists, time lines, flow charts, and specific strategies are commonly offered to assist conference program planners. Such literature can be most helpful, but it tends to ignore the educational function of program planning. The nuts-and-bolts strategy falls short in capturing the "soul and spirit" behind effective conference program coordination.

Yet another description of the planning process focuses on *competencies* necessary for conference program planning, such as program development, budgeting, promotion, organizing, logistical arrangements, and group facilitation. Indeed, many job descriptions for such positions enumerate these skill areas. Hiring decisions seem to be based on a planner's past experience with the nuts-and-bolts of the second approach and perceived competence with respect to the skill areas reflected in the third approach. See the list of planning resources at the end of this chapter.

Each of the approaches described above captures a part of the essence of conference program planning. Each adds something valuable in describing the "magic" often worked by good conference program planners, and the reader is encouraged to investigate them. Effectiveness results, however, from something more integral and subtle. As Ilsley expresses it:

Linear models	"Nuts-and-bolts" models	Competency-based models
• Needs assessment	• Checklists	• Program development
• Goals and objectives	• Time lines	• Budgeting
• Design	• Flow charts	• Promotion
• Location of resources	• Pitfalls	• Organizing
• Implementation	• Specific strategies	• Logistics
• Evaluation		• Group process

Figure 2. Traditional program planning models.

> It is therefore fair to assert that good planning is necessary but not sufficient for a conference to be a success. . . . As is true in planning any learning experience, successful conferences depend on matching the expectations of planners with those of participants. Viewed this way, a conference is more than implementation of technical strategy . . . efficiency is not enough for successful conferences. (1985, p. 89)

New Perspectives

We must overcome the temptation to trivialize the process of conferences and institutes program planning by reducing it to steps and tasks. As we become partners in planning conference programs, we perform essential roles—roles that require great understanding, finesse, and patience, in addition to skill. We have typically underestimated the scope of those roles and undervalued the experience and perspective necessary to play them well. A great deal more is occurring than just *facilitation*, as we traditionally define it. In the planning of conferences and institutes programs, I believe that we perform much more significant roles than we acknowledge. A comprehensive model of knowledge, skills, *and* roles is presented in Figure 3.

What Roles Do We Play?

Whether conference program planning is a full- or part-time responsibility, planners are called upon to play many challenging roles. They may be responsible for the creation and direction of the planning committee, the financial plan, the program design, the promotional strategy, as well as the smooth functioning of the actual activity. Suddenly the planner has become

group facilitator, business manager, teacher, marketer, and logistics expert all in one.

Throughout the life cycle of a conference program, planners perform complex roles that require a blending of steps, skills, insights, and understandings. At the same time, the planners are playing the roles of politician, co-worker, interpreter of missions, statesperson, entrepreneur, and administrator. Those roles fall into three categories: interpretational roles, entrepreneurial-administrative roles, and relationship roles (Figure 3).

Discussion of these roles provides the major focus of this guide. However, before moving to the essence of the publication—the roles of effective conference planning—we need to examine briefly the foundations of the model in Figure 3: the knowledge base and the competency base.

Knowledge Base

Knox (1979) identifies four knowledge areas as integral to the development of managerial roles, and thus to successful conference program planning:

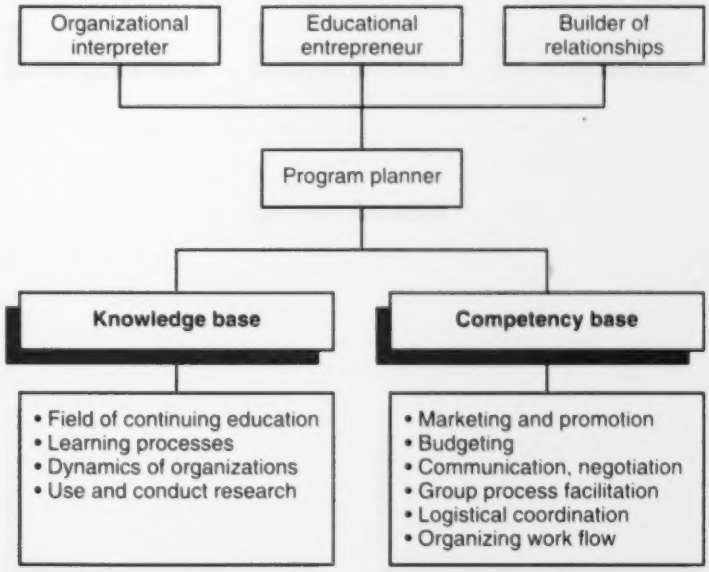

Figure 3. A new model of conferences and institutes program planning.

- A perspective on the field of continuing education
- An understanding of the learning process and its relationship to adulthood
- A sensitivity to organizational dynamics
- The ability to utilize and to conduct, when necessary, relevant research

Perspective on the Field of Continuing Education

A perspective on the field of continuing education is widely accepted as essential for practitioners, including conferences and institutes program planners. Such a perspective includes knowledge of the scope and structure of continuing education. Several sources provide surveys of programs and providers (Harrington 1977; Knowles 1977, 1980; Merriam and Cunningham 1990). Of added importance is an understanding of how different providers relate to their parent organizations. Is continuing education the primary focus of the entire organization, or does the continuing education unit exist in an organization that gives greater priority to other functions (King and Lerner 1987; Knox 1979)?

Such a perspective also involves an understanding of the demographics of continuing learners—age, race, income level, geographical location, reasons cited for learning, and the like (Cross 1974; Darkenwald and Merriam 1982). Equally revealing in the data are the categories of adults who are not typically served. Awareness of the characteristics of adult learners enhances a clearer understanding of the individual needs of specific audiences.

This theoretical perspective also appreciates the symbiotic relationship of continuing education with societal issues. Programming may originate in response to the emerging trends of social culture (Aslanian and Brickell 1980; Cross 1981; Merriam and Cunningham 1990). Continuing education efforts often directly contribute to social change by empowering individuals to transform their circumstances and environments.

According to Knox (1979), the informed perspective includes an awareness of resources available for continuing education efforts. Such resources might include people, organizations, literature, and funding sources. Successful practitioners must not only keep abreast of such resources, but must be skilled in relating program needs and available resources (Merriam and Cunningham 1990).

Understanding of the Learning Process

"Some knowledge of theory always aids practice," as J. Roby Kidd states in his chapter that surveys various historical approaches to a theory of learning

(1975, p. 148). Over the centuries, different "families" of theories have contributed to a current understanding of what learning is, how and why it takes place, and how it can be structured and encouraged. Successful planners have been exposed to the variety in the literature and pursue planning activities with this bedrock perspective.

This understanding is invaluable in setting up learning experiences that are designed to maximize learning. A brief illustration will illuminate the value of this knowledge. For example, we know that in most instances, an individual's learning is greater to the degree to which one is actively involved with the knowledge or skills to be acquired. On the basis of this assumption, we make informed decisions about program structure, materials, and budget. We include opportunities for learners to read about topics, practice skills, and discuss issues with peers. We budget for audio-visual equipment to enhance presentation of information. We schedule special breakout sessions where interaction can occur. We seek out and provide readings, outlines, and other instructional aids.

Planners are encouraged to sample readings about learning in adulthood (Anderson 1980; Boshier 1977; Darkenwald and Merriam 1982; Hiemstra 1976; Kidd 1975; Klevins 1982; Merriam and Caffarella 1991; Tyler 1957; Whitbourne and Weinstock 1979).

The literature on the issues of adulthood and its relationship to learning is also vast (Aslanian and Brickell 1980; Brookfield 1988; Cross 1981; Darkenwald and Merriam 1982; Gould 1978; Havighurst 1972; Kidd 1975; Knowles 1973, 1980; Knox 1977; Long 1971; Lowenthal, Thurnher, and Chiriboga 1975; McCoy 1977; Whitbourne and Weinstock 1979). Practitioners need an appreciation of the developmental nature of adulthood—the physical, psychological, and emotional. Transitional events related to adulthood often lead people to seek a learning environment. Adults develop a heightened interest in learning in response to life-cycle trends. Moreover, most adults are voluntary learners: they seek learning that is relevant to their life roles, learning that leads to increased effectiveness, which in turn allows them to participate in determining needs, goals, strategies, and feedback. By the time people reach adulthood, they have a preferred learning style, which has been influenced by previous learning experiences.

Sensitivity to the Dynamics of Organizations

Conferences and institutes program planners can benefit greatly from sensitivity to the dynamics of organizations on at least four specific levels. This awareness is helpful in understanding one's own organization, as well as the many organizations often cooperating on a program.

At the first level, organizations are made up of individuals. Individuals will have different past experiences, different goals and expectations,

different needs and wants, and very different perceptions of the same phenomena. No matter how successful the workings of a group, it is still composed of individuals, each of whom operates on the basis of complex personal theories.

Second, the organization is designed in a particular structure that has a significant effect on the way work is accomplished and on the nature of interaction among individuals. Structure communicates many things in and of itself—power and status of position, significance and centrality of the function, and the philosophy and complexion of the organization. Structure will at times facilitate accomplishing goals; at other times, structure will make meaningful progress almost impossible. Effectiveness results both in doggedly navigating the structure at times, while succeeding in spite of structure in other instances.

Third, power and influence are *distributed* throughout the organization—not simply in the managerial roles. Shared by many organization members, power and influence are derived from possession of information, expertise and experience, importance of function, control of certain resources, and a whole host of factors in addition to hierarchial position. The importance of understanding where different aspects of power and influence reside within a given organization is amplified in Chapter 5.

Finally, organizations have cultures that are often complex and ambiguous. Cultures are based upon tradition, upon organizational lore, and upon shared values. New people are quickly socialized into specific cultures. Deviant behavior is exposed and discouraged. While culture is not immutable, it is extremely stable. It can be an organization's worst enemy, but it can also preserve and protect an organization through threats and dangers. Effective program planners are skillful at quickly reading organizational cultures and adapting strategies to the specific setting.

The above is merely a brief overview of the broad concepts of organizational behavior. Because of the complexity of the planning that is required, program planners must operate within many different organizations, in addition to their own. An understanding of and senstitivity to these dynamics are valuable as the program planner tiptoes through many organizational mine fields. Many a conference program has been unsuccessful not because the program itself was unsound, but because of the planner's insensitivity to organizational issues. For more indepth discussion of organizational behavior, see Bolman and Deal (1984), Bradford and Cohen (1984), Davis (1977), Glueck (1980), Knox (1980), and Simerly (1987).

Ability to Utilize and Conduct Research

It is generally agreed that some form of inquiry and discovery is necessary to verify, improve, and professionalize practice. Knox (1979, p. 35) would enhance the proficiency of continuing education practitioners by increasing their ability to use and conduct research that is relevant to learning and planning. Other writers have echoed the need for a body of research for the general field of continuing education and for leaders who appreciate and use research outcomes in programming (Deshler 1990; Keller 1983; Kreitlow 1976; Long, Hiemstra, and Associates 1980).

Very little research has been done on conference programs or the planning process itself. For example, each year the Conferences and Institutes Division of the National University Continuing Education Association (NUCEA) solicits nominations for awards in the area of research on conferences and institutes programming. Since the inception of the research award category in 1984, only sixteen nominations have been submitted (DiBella, personal conversation, June 1992). Plans are currently under way by the division to provide seed money to stimulate research projects. As conference program planning becomes a sophisticated and maturing role of the continuing education function as a whole, research and theory must evolve. Studies addressing issues of program design, finance, promotion, and delivery could provide valuable insights and advances.

Comptency Base

Now let's examine the other leg of the new model: the competency base. Six areas of competency are essential for effective program planning:

- Marketing and promotion
- Budgeting
- Communication and negotiation
- Group process facilitation
- Logistical coordination
- Organization and supervision of work flow.

A brief discussion of the components of each follows:

Marketing and Promotion

Marketing and image management are extremely important competencies in conference program planning. Planners must be able to conceptualize a comprehensive marketing thrust for each individual programming effort.

This includes matching promotional strategies with goals and target audiences, creating and monitoring deadlines and schedules, and producing effective promotional pieces.

Effective marketing of a conference program starts with a clear understanding of the audience and the program. Knowledge of marketing principles in general and direct marketing research specifically is equally essential. Planners need to be articulate and skilled at writing marketing copy, as well as in coordinating the graphic design and layout phases of a project. These tools assist planners in creating appropriate images for attracting learners (Kotler and Fox 1985; McCarthy 1968; McCarthy and Perreault 1985; Simerly 1989; Stanton 1984).

Budgeting

Very often program planners have fiscal responsibilities for their programs. The overarching role of financial manager will be discussed in Chapter 5, but specific skills are applicable where a competency base is concerned. Those skills include the ability to develop budgets that are realistic, creative, instructive, and at times profitable. Explicitly, this involves analyzing and projecting both income and variable and fixed costs, computing break-even points, and making contingency plans.

Well-designed budgets can serve as a good "road map" for the conference program planner and planning committee members alike. As planning proceeds, budgets and expenditures must be monitored with caution *and* flexibility (Matkin 1985; Simerly 1981).

Communication and Negotiation

Communication and negotiation are essential to most endeavors. Conference program planners must be masters of the communication process as they continually interact with a variety of people—faculty clients, coworkers, support staff, outside vendors, government personnel, and more. In addition, planners are often called upon to facilitate the communication between other parties—between the client and the graphic designer, between the learner and the facility. Program success depends on clear and accurate communication of goals, needs, objectives, and instructions. Likewise, effective negotiation skills are critical as planners secure and align program resources in a way that best serves the needs of represented parties. The conference program planner is most likely to be the pivot around which these processes revolve.

Group Process Facilitation

Rarely are conferences and institutes programs the result of one person's effort. The very nature of the event implies that a group or groups are involved. Often the true significance of the program lies not only in the content presented, but in the collaboration of the groups represented. Artful mastery of group process and facilitation will always be critical for conference program planners.

Planners must be skilled in influencing group process when someone else is technically in charge. They must provide assistance in drawing out unvoiced perspectives. They must know how to construct planning and advisory groups and how to move them through planning in a way that attends to both task and process.

Logistical Coordination

Webster's Dictionary defines "logistics" as the "procurement, distribution, maintenance, and replacement of material and personnel." No one can deny that the management of logistics is essential to good conference program planning. Planners procure, distribute, maintain, and replace all sorts of things, from food and lodging to printing; from audio-visual equipment to transportation; from cows' hooves to tote bags.

Finding challenge in the orchestration of logistics may in fact be what attracts people to the role initially. Logistical planning, however, is not the whole of what good programming is about.

Organization and Supervision of Work Flow

Good conference program planners are skilled in identifying what needs to be done for projects at varying stages of implementation and in planning work flow. The best planners involve co-workers, support staff, and committee members in the identification and planning process where appropriate.

Once the work flow is agreed upon and organized, the planner delegates tasks and coordinates and monitors progress. Support staff, co-workers, and committee representatives carry out specified tasks. Through this process, responsibility for the many details that conferences and institutes programs embody can be truly shared among all concerned.

In Summary

Effective conferences and institutes program planners are a unique blend of manager-educators performing a series of managerial roles. These roles are

built upon two platforms or bases—a knowledge base and a competency base. The knowledge base incorporates a perspective on the field of continuing education, an understanding of the learning process and of adults as learners, a sensitivity to human behavior in organizations, and the ability to use and conduct research. The competency base includes the specific skill areas of marketing and promotion, budgeting, communication and negotiation, group process facilitation, logistical coordination, and the organization and supervision of work flow.

Presented below are references that relate to the knowledge and competency bases. While the literature is helpful in describing these bases, it has not addressed how knowledge and skill are integrated into specific managerial roles. Effective portrayal of these roles leads to successful program planning and will be addressed in the chapters that follow.

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Chapter 3
The Program Planner as Organizational Interpreter

Chapter 1
The Conferences and Institutes Program Planner: A New Model

Chapter 2
Building on Traditional Bases toward a New Model of Conferences and Institutes Program Planning

Chapter 3
The Program Planner as Organizational Interpreter

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Chapter 5
The Program Planner as Builder of Effective Relationships

Chapter 6
New Perspectives on the Role of the Conferences and Institutes Professional

References

• Double Tree Community Hospital offers a series of workshops focusing on alcoholism. The weekly educational session is designed to provide accurate information to area citizens. Topics include chemical dependency, biological predisposition to alcoholism, warning signs, treatment options, and intervention opportunities for both the alcoholic and significant others. Although alcoholism has long been considered a social problem, more and more attention is being focused on the medical and health-related implications of the disease. The medical staff in the hospital sensed a need for such programming in the community and hoped to lessen some of the stigma associated with the disease by offering instruction in a medical setting. Administrators favored the idea as a way to bring area residents into the facility in hopes that they would turn to that hospital for medical care in other situations. In that way, the program addressed the expectations and concerns of several significant interests—not only do area residents benefit by the sessions, but Double Tree enhances its reputation as an institution in partnership with its community.

• The continuing education unit at Davis State University (DSU) entered into an agreement with a statewide professional association for nurses to provide recertification training for members. DSU did not have a degree program in nursing, but instead used adjunct faculty members to teach the courses. DSU's stated mission for continuing education was to support and assist various components of the university community in the planning and delivery of programs. That meant that traditionally the division did not coordinate programs where there was no academic unit involved. The conference program staff, however, saw the nursing program as valuable to its audience, as well as financially lucrative for the division. The recertification program grew so large that the continuing education unit was devoting an increasing amount of office resources to the project. Programs sponsored by university academic units were continually being short-changed because of the pressing demands of the nursing program. The continuing education unit found itself in a position as educational broker of programming that was not consistent with the function of the larger institution.

The Role of Organizational Interpreter

Representational roles relate to the individuals and the institutions that we represent (see Figure 3). When we are operating within the context of representational roles, we can be said to be operating as *organizational interpreters*. Effective organizational interpretation involves the issues outlined in Figure 4.

Conference planning does not occur in a vacuum, but rather in a complex organizational environment. Success often relies heavily on how well planners understand the relevant organizational context(s) and how closely they relate their activities to those contexts.

Conference program units usually reside within larger organizations in professional, business, or academic environments. Within professional associations, a conference program planner may be part of a membership services department. Appropriate programming for that planner might be an annual meeting of professionals in the field to address issues of mutual concern. In business organizations, a program planner might be part of the personnel division, planning training seminars for company staff. In academia, a conference program unit may be part of a larger continuing education organization, which is then part of a college or university. Programs supporting that mission might focus on disseminating research that shows the effects of weather on road construction, for example.

The degree to which the activities of the planning unit are consistent with the complexion of the larger continuing education unit and the institution at large provides focus for program activities. In addition, conference programs are often jointly sponsored by groups representing a variety of organizations. In this situation, the complexity of the organizational landscape expands exponentially. Program planners must always be relating

Effective conference program planners:

- Represent continuing education to internal constituencies
- Interpret missions to external publics
- Select appropriate programming activities
- Respond to internal and external expectations
- Adapt to internal and external limits

Figure 4. The conference program planner as organizational interpreter.

their activities in the planning process to these organizational environments. This chapter will explore in greater depth the activities identified in Figure 4.

The Dual Role of Representation to Internal and External Constituencies

The role of organizational interpreter positions program planners to operate in a dual mode. Within the larger organization, planners represent continuing education and lifelong learners. At the same time, we represent our organizations to the outside groups and agencies with whom we plan programs. The two-way nature of these representational roles is illustrated in Figure 5. Serving as advocates of internal and external constituencies—simultaneously representing the missions and objectives of both—is critical to sucess in program planning.

Representing Continuing Education to Internal Constituencies

In situations where conference program planning or continuing education is not the sole activity of our parent organizations, we become advocates for the individuals and the organizations who interact with us in programming. Indeed, we may become an internal spokesperson for lifelong learning in general. Let's look at a few examples of this advocacy role.

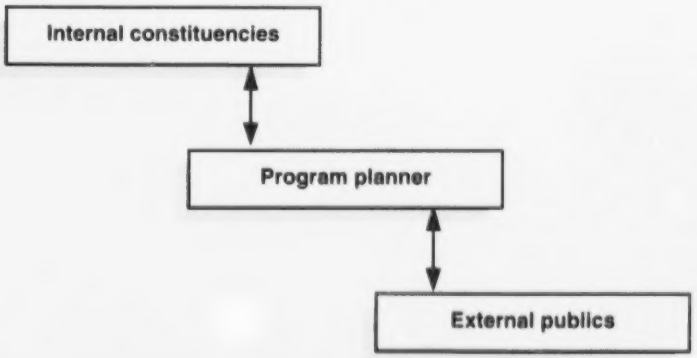

Figure 5. The conference program planner as representative of internal constituencies and external publics.

Consider a large government agency dedicated to the law enforcement needs of its state. Training budgets are tempting prey during lean budget times. Staff members in the training department become advocates for the learners who attend their programs. They literally represent the training and development function to those who run the agency as a whole. They are the spokespeople for continuing education issues within that agency.

The same is true within community colleges. For example, the business office does not offer payment of fees by credit card. The conference program planner, however, negotiates the implementation of a credit card option, because it will be needed by program participants. The planner is the representative of continuing education in this setting.

Interpreting Missions to External Publics

Not only do we represent continuing learners to internal constituencies, but simultaneously we represent our institutions to those learners.

All organizations have missions. Conference program planners are found in a variety of parent organizations such as community colleges, four-year colleges, research universities, hospitals, professional associations, government agencies, and social service agencies. The mission of a professional association may be to serve its membership and enhance the standards of the profession. Large research universities generally embrace a threefold mission of teaching, research, and public service. Community colleges focus on general and technical education and community service. Program planning units pattern their missions after those of their parent organizations.

In addition, program planners work with many external organizations and regularly serve as interpreter of their institutions to the outside world. For many external publics, the program setting is the only direct contact they will have with the parent institution. In colleges and universities, conference programs often serve individuals who have not typically been consumers of higher education. Learning activities in professional associations are planned not only to provide service to members, but also to acquaint nonmembers with the value of the association, thereby attracting new members.

Conference programs interpret the missions of their parent organizations to outside constituencies in various ways. Perhaps the strongest messages are conveyed through programming choices. The mission of the parent organization and the subsequent mission of the program planning unit provide the blueprint for the selection of appropriate programming.

Selecting Appropriate Programming

Conferences and institutes programs are usually geared to the nature of the larger organization. In the first example at the beginning of this chapter, the alcohol awareness program was consistent with the hospital's mission of providing health care and health care information to its community. Although the medical staff, the administration, and the public had very different expectations, the program was an appropriate endeavor for all three. The second example—the recertification program—shows how easily mission and organizational expectations can be forgotten when an attractive opportunity emerges. Program planners tend to be highly proactive problem solvers with a propensity for seizing opportunities when they arise. Even though DSU's certification program was educationally sound and financially successful, it diverted necessary resources from the primary mission.

Organizations that engage in programming with related types of activities are presented in Figure 6.

It is not uncommon, however, for planners to inadvertently become involved in programming that detours them from the central mission of the internal organization at large. Some conference program units have become involved in inappropriate activities to financially subsidize more centrally related programming, only to discover that such activities are actually diminishing the resources available to the core programs. More than a few program planning units have learned a tough lesson about "sticking to their knitting." In short, the mission of the program planning unit should be clear and consistent with that of the larger organization, and programming should be selected on the basis of compatibility with that mission.

Organizations and Their Expectations

Alongside organizational missions are organizational expectations. Some expectations are consistent with the mission of the unit; others are tangential to, or in outright conflict with, the purpose of the organization.

The program planner constantly weighs and responds to a variety of expectations. The parent organization or the larger continuing education unit may expect the planner to generate income to subsidize other activities. Within professional associations, programs for the membership often provide a significant portion of the association's annual revenue. In colleges and universities, the parent institution may expect the program planning unit to develop programming that accomplishes other goals such as the use of residence halls and dining facilities during summer sessions. Business and

Type of Organization	Types of Appropriate Programs
Business and industry Stated mission: training employees	Programs that teach relevant job skills—technical skills, communication skills, governmental regulatory issues, managerial and leadership development
Colleges and universities Stated mission: initiating and supporting institutional outreach	Programs that complement and extend the teaching and research activities of the institution—topic areas indicated by various strengths of academic units
Community colleges Stated mission: community outreach, advancing and workforce economic development	Programs that address community needs, avocational programs, training and human resource development, small business assistance
Health care providers Stated mission: employee training community health education	Programs designed for health care personnel, governmental health administrators, general citizenry—training in new skills, raising awareness of critical health issues, increasing visibility of facility for all health care needs
Professional associations Stated mission: membership recruitment, development, and retention	Programs geared to developing the membership, attracting new members, maintaining membership by reinforcing the value of the association to the members, enhancing the overall value of the profession
Government agencies Stated mission: staff training and development	Programs related to the purpose agency—improving technical skills, relationships with constituencies, and efficiency and effectiveness within the larger governmental system; developing managerial and leadership talent

Figure 6. Types of organizations and appropriate programs.

industry may expect the staff to plan meetings that not only serve an educational purpose, but also function as part of the company's incentive and reward structure.

Internal subunits within the larger organization often have very different expectations. Academic units may approach conference program planners simply for assistance in "banking" registration moneys or for clerical assistance. Personnel divisions of corporations may turn to the training

component for a program that focuses on a sensitive organizational issue that may or may not be appropriately addressed through training. The budget and finance unit of a large health care institution may look to noncredit continuing education offerings as a vehicle for filling hospital beds. Even though such expectations may not be inappropriate or unreasonable, they may conflict with traditional educational objectives.

External constituencies often expect program planning units to be a ready partner in addressing any and every societal issue or business need, regardless of whether it is appropriate for the institution to respond to the particular issue. Public educational institutions are particularly open to outside expectations when taxpayers may feel that they have shareholder status. Groups of all types often turn to program planning units for coordinating assistance that is difficult and costly to obtain in the private sector. Such groups may expect services to be provided at little or no cost because the institution is public in nature.

Such expectations on the part of the larger institution, internal subunits, and external publics create great opportunities for program planners. They may conflict, however, with objectives more central to educational and/or financial goals. Program planners must carefully choose which expectations they should respond to. In reality, program planners must be especially creative in balancing their responses to their parent organizations, to internal subunits, and to external publics.

Organizations and Their Limits

Conference program planners operate within an environment that has internal and external limits. Limits take many forms—legislation, policies and procedures, physical facilities, human and fiscal resources are among the most prevalent.

Bureaucracy is a term frequently used in discussions of the effectiveness of organizations. The term is usually reserved for discussions relating to government, but in reality all program sponsors, even relatively small associations and companies, operate within structures that have procedures and norms.

The larger the organization, the more complex the bureaucracy and the greater the number of steps required to achieve results. Health care institutions have both elaborate internal structures and strict external regulatory concerns. Educational institutions have academic review boards, accounting and purchasing divisions, and internal auditing procedures. Governmental agencies have similar structures designed to prevent abuse and excess where the public trust is involved. Private corporations have internal

structures as well as traditions and norms that may place limits on the type of programming done, instructional resources used, and even the location of the program.

All organizations have such limitations. While often frustrating to program planners, structures and procedures usually arise out of a need for some system of checks and balances. Norms and traditions are an important part of organizational culture. Functioning effectively with parent organizations and external environments is greatly affected by these limits. Program planners have historically been quite successful in maximizing their efforts in light of their limits.

In Summary

Internal and external organizational missions, expectations, and limits combine to provide the milieu in which program planning takes place. Success is governed by the degree to which program planners clearly understand and appropriately interpret those organizations. Conference program planners play a unique role in interpreting the parent organization's mission through continuing education programs. Planners must be able to assess the appropriateness of the program to the institution. They must be able to identify programming that is not central to the integrated organizational mission and avoid it.

The parent organization, internal subunits, and external publics have broad expectations where conference program planning is concerned. Effective planners are those who are able to select which expectations to respond to and in what manner. They are able to prioritize expectations and balance more central objectives with peripheral ones. Balancing expectations and goals is a persistent challenge.

All organizations have limits. These limits often take the form of structures, procedures, norms, and traditions. While such guidelines may at times be restrictive to expedient planning, they also serve a valuable purpose in setting some comfortable boundaries within which planning can occur. Successful planning involves navigating within the limits of the organizational context.

Within the framework of the goals, expectations, and limits, conference program planners become interpreters of the institutions and constituencies that they represent. They must be skillful in integrating internal and external aims and objectives and in powerfully articulating those ideas each to the other.

Chapter 4
The Program Planner as Educational Entrepreneur

- A large public university in a midwestern state had been conducting training programs in the evaluation, rehabilitation, and management of pavements for many years. Cosponsors of the program included the university's Department of Civil Engineering and a U.S. Army research laboratory located in the community. As an outgrowth of the course, computer software was created that allowed pavement engineers to analyze data about pavement surfaces and to plan maintenance schedules and budgets. Demand for the software was great. The program planning unit that had been delivering the training entered into an agreement with the cosponsors to distribute the software to interested engineers.

  Such an effort was somewhat different from normal program planning and required the creation of a new organizational structure. The planning was quite similar to the creation of a small business. Costs were analyzed, advisory groups consulted, target markets identified, and personnel selected and trained. In less than six months, the number of subscriptions projected as a break-even point for the first year had been reached. In later years, similar software was developed and distributed for evaluating roofs and railways. What had initially seemed like an uncharted and risky venture proved to be very successful.

- The First Annual Industrial Physical Plant Conference drew only twenty-four participants and represented a substantial financial loss for the conference program unit of the same midwestern university. The idea for the conference came from an active faculty member who sensed a need for training in energy systems, water treatment issues, and general mechanical engineering concerns of people who manage the physical facilities of medium to large industries. Similar programs for people in state facilities, as well as utility companies, had been successful for many years. A planning committee was assembled representing industries of various types and sizes.

  The advisory committee indicated that the need for such a program was great and advised the conference program staff on a proposed needs assessment. The conference program staff developed a questionnaire, selected a sample of such industries, and conducted extensive telephone interviews with one hundred individuals. Response was positive and enthusiastic. The program was developed and then marketed to a large

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market. As indicated above, registration results were dismal, despite the careful preliminary analysis. Representatives of the target group still echo the need for good programming, but the venture failed. The temporary organization was carefully conceptualized, developed, and launched, only to go bankrupt.

The Entrepreneurial Role of the Conference Program Planner

Entrepreneurship currently commands a great deal of attention, both in the private and the public sectors. Continuing educators are often considered the entrepreneurs of their parent organizations. Nowhere is this a more fitting distinction than in the realm of conference program planning.

The process of planning and managing a conference program is not unlike a small business venture. A traditional program planning model and the steps involved in creating a new business are compared in Figure 7.

In Chapter 1, traditional models of program development were discussed. Such models involve needs assessment followed by objective-goal determination, design of instruction, location of resources, implementation, and finally evaluation. Consider the steps involved in creating a small business: analyzing the need in the marketplace and projecting sales, positioning the product or service to occupy a specific market niche, designing the product or service, creating the structure necessary to produce the product or service, including locating material and human resources,

Traditional Program Development	Entrepreneurship
• Assessing audience needs	• Analyzing the market
• Determining objectives and goals	• Positioning in a market niche
• Designing the program	• Designing the product or service
• Locating resources	• Structuring material and human resources
• Implementing the program	• Launching the business
• Evaluating and modifying the program	• Monitoring success and adjusting as necessary

Figure 7. Comparison of steps in program planning with starting a new business.

launching the project, monitoring its success, evaluating the viability of the business, and making adjustments where necessary. These steps closely parallel the steps of traditional instructional design.

Webster's Dictionary defines an "entrepreneur" as "one who organizes, manages, and assumes the risks of a business or enterprise" (1983, p. 416). As shown in Figure 8, this definition can be extended to the role of the program planner as educational entrepreneur.

The Organizational Role

The premise of this book is that conference program planning is more than a series of steps carried out through the performance of discrete skills. Likewise, organizing is a great deal more than simply scheduling a brochure or staging the registration process. The role of organizer is systematic yet creative, straightforward and yet subtle. It involves developing a structure that synthesizes interdependent parts into a creative whole. It also involves integrating and coordinating various people, organizations, and details.

Developing a Structure for Planning

Planning a conference program requires the creation of a small, temporary organization. Each program has its own unique set of components. Each program serves a unique audience through a unique format planned by a

Organizing
• Developing a structure for planning
• Integrating and coordinating discrete systems
Managing
• Providing leadership in identifying and solving problems
• Maximizing the use of resources
Financial Management
• Negotiating and monitoring the budget
• Assuming and managing risk

Figure 8. Roles of the conference program planner as educational entrepreneur.

unique group of vested parties. The program planner must then create a unique structure through which planning can take place.

The structure that the planner must create is often complicated and may consist of several subunits (Figure 9). For instance, there may be a planning committee. Then there are various representatives of facilities—often different people to contact for pricing, set-up, food and beverages, and audio-visual and other kinds of equipment. In addition, there are individuals who design and produce written materials, individuals who facilitate the procurement of goods and services, and the in-house support staff that will ultimately process registrations, prepare instructional materials, and handle other distinct details of the process. In a sense, the program planner is a general contractor who establishes a system of subcontracts with numerous providers and resources to implement a program.

Creating this structure may be very challenging; managing and maintaining it may become overwhelming—not to mention the fact that the typical planner is simultaneously involved with many structures in various stages of development.

Integrating and Coordinating Discrete Systems

Integration and coordination are key components of the organization process. The needs of the planning group must be integrated with the needs of the work group, that is, the conference program planner and support staff. If the planning group is working to develop a targeted mailing list, but the

Figure 9. Interrelated parts of planning structure.

time line agreed upon with the planner is not observed, then the in-house staff members responsible for the input and output of mailing lists are thrown off schedule. The flow of work is interrupted. The program planner is trapped in the middle, trying to integrate multiple systems.

As another example, the needs of vendors must be coordinated with the needs of the program. A professional association hosts an intensive training program for a small group of its members. A critical part of the program revolves around recognizing those who complete the training with a special framed certificate at the end of the course. The artist who will prepare the certificates needs lead time, as will the vendor who frames them. All of these activities must take place after it is known who will complete the training. Again, the program planner must integrate several systems simultaneously.

Successful planners are those who see organization as more than just nuts-and-bolts kinds of activities, but rather a process that allows for the coordination and integration of numerous subsystems. In their organizational role, educational entrepreneurs create a unique organism—"one that emerges in response to a given need, is flexible in its functions, may spontaneously die, but above all is dynamic in its approach to the program planning process" (K. Brainerd, reviewer's comments, 1992).

The Managing Role

As the organizational structure of the program evolves and the systems for integration and coordination begin to operate, the planner plays a managing role. This role may be thought of as one of leadership, because conference program professionals "lead" groups and individuals through the planning process.

Providing Leadership in Identifying and Solving Problems

Heifetz and Sinder (1988) describe leadership as "the usually turbulent process of putting people's problems back in their own laps without abandoning them" (p. 198). This definition distinguishes the leader from the appointed authority figure. In fact, the authors argue that the appointed authority may be unable to exercise leadership in many situations precisely because he or she *is* the appointed authority.

This concept of leadership has nothing to do with supervision, control of resources, or some kind of inherent vision for the organization and the future. Any member of the group can exercise leadership by pressing the group to attend to its work. Leaders help the group to identify and define problems, address conflicting viewpoints, and design solutions. Within this

definition, program planners are often in a unique position to exercise the critical role of leader.

Conference Program Planners as Leaders. Many programs have a planning committee in some form. Members of planning groups often have very different agendas and varied levels of experience with planning programs. What may be a rather routine type of program to a seasoned planner is often a first-time event for committee members. Professional reputations are involved, and individuals can be completely absorbed in the success of the program.

Conference program planners rarely serve as chair of the group, but rather function in a support role. Their job is to facilitate planning to guide the group through the issues that it must address and the decisions it must make. Program planners help to ensure that conflicting viewpoints surface, that tangential discussions are brought back to the task, and that awkward issues are addressed. Consider the following example:

- A large planning committee meets annually to plan a theater festival for two thousand high school students. Members of the committee include representatives of the State Board of Education, high school theater directors, the statewide professional theater association, as well as the university's theater department and continuing education unit. Historically the committee has been uninvolved with financial issues. Its primary goal has been to keep the registration fee low.

  At the same time, the committee has naturally wanted to improve various aspects of the program. Such improvements invariably cost money. Over the years, the conference program planner has been able to lead the group to analyze its priorities, to cut back on expenditures where possible, to investigate sources of outside funding, and in general to take responsibility for the huge financial risk involved in conducting the program. Such leadership must occur even though the conference program planner is not the appointed authority of the group.

This is just one example of a situation where the program planner can play a critical leadership role. In a broader sense, the program itself is a way of enabling a group to address the issues at hand. Program themes usually result from a new problem or opportunity facing the group, rather than from issues that have already been resolved.

For example, manufacturing organizations face problems associated with quality control, wise use of energy, and rapidly changing technology. Workshops and training seminars are developed around such issues as statistical process analysis, use of microcomputer production systems, newly developed composite materials, and energy management systems

and alternative fuels. Educational institutions are faced with funding cutbacks, new populations, and accountability to a variety of constituents. As a result, programs are developed around issues such as institutional research, institutional mission, technology transfer, and cultural diversity. In like manner, health organizations must address liability issues, new developments in research, and complex medical, social, and psychological phenomena such as AIDS (Acquired Immune Deficiency Syndrome).

Program developers and planners exercise leadership as they identify critical issues and then create formats through which relevant parties can address those issues. The inherent purpose of conferences, seminars, and similar kinds of activities is to assemble people to disseminate and transfer knowledge. But more than that, programs look to the participants to address critical and future issues. It is not uncommon for the group to take the form of a task force charged with generating research agendas and significantly affecting policy. The conference program planner is an important player in enabling the group to work on the problem. The planner is a valuable part of the leadership and problem-solving process.

In summary, as conference program professionals we lead planning groups to analyze priorities and to take responsibility for various aspects of the program. Such leadership must occur, even though we are not likely to be the *appointed* authority of the group.

Maximizing the Use of Human Resources

Although a program planner may sometimes feel like a one-person show, most programs are the result of many people's efforts. Within the temporary organizational structure, planners are often responsible for staffing various functions of planning and for training those who will assist. This support takes the form of secretarial and bookkeeping help to perform functions such as registration, bookkeeping, cash handling, mailing-list management, routine setups, correspondence, and assembling instructional materials. Even when these people report to other departments or individuals, the program planner's success depends on effectively preparing support staff.

Staffing. Human energy represents the largest and most critical resource in modern organizations. The conference program planning unit is no exception. Planners must be skilled in mapping out activities in their heads, and then assessing and anticipating how many staff members will be needed for registration, for example. It's just as important not to tie up too many people as it is not to be short-handed. In these days of shrinking resources, the efficient use of staff is critical—time wasted on one activity is doubly expensive as time "stolen" from another. Balancing human resources takes some experience and often guidance from others.

Training. No one likes to be given a responsibility for which he or she is underprepared. People want to be successful at what they are asked to do. Attention to effective preparation for support staff adds to program success. Registration staff members who are adequately prepared and informed are able to provide expert customer service. Graphic designers who understand the audience, objectives, and purposes of a program are better prepared to generate images that are compatible with the program and will draw interest. Business managers who understand the funding specifications of a particular cosponsor are better able to provide accurate, timely financial data.

The value of effective staffing and training may appear obvious. The tangible and practical benefits of a well-prepared staff are difficult to dispute. Sometimes, however, in the rush of final preparation, this vital function is overlooked. Chapter 5 will examine the value of cultivating relationships from the more subtle, interpersonal dimension.

The Role of Financial Management

The role of the educational entrepreneur involves generating and allocating fiscal resources. Just as the traditional entrepreneur analyzes costs and benefits and determines price, the program planner must be skilled at analyzing the financial health of each program.

In the traditional business world, such activity is generally associated with a bottom-line goal of generating profit. While the relative expectation of profit varies among organizations involved in program planning, it is safe to say that most conference program units are primarily self-supporting. According to King and Lerner (1987, p. 21), "expectations for continuing education units [span from] . . . either aggressive profit centers to conventional academic units." The authors add that the organization "often melds these distinct expectations with varying degrees of coherence, so as not to expect that continuing education units will be both." Although these comments are made in the context of a continuing education unit within a large university, the observations often hold true for conference program planning units in various other types of organizational settings.

In addition, moneys generated by program activities may be diverted to augment traditional institutional funding. Professional associations have long looked to continuing education activities as ways of keeping membership fees low. In educational institutions, moneys generated by conference program activities are used in various ways—to assist sister continuing education units or to subsidize other activities of the larger parent organization—or they may be returned to client groups such as academic departments or professional associations. As mentioned in an earlier chapter,

program activities within hospitals are often seen as vehicles for generating referrals. Let's examine the specific parts of financial management in greater detail.

Negotiating and Monitoring the Budget

Informed risk management requires skill in the creation of realistic budgets. What is difficult with regard to budgeting is not the mathematical aspects, but rather the human dimensions. Conference program planners rarely prepare budgets alone, without input and consideration by other stakeholders. What stymies planners most is not "how to" prepare budgets—that can be learned in a matter of hours—but instead how to "talk about" budgeting.

Uppermost in this dilemma is the inability to articulate the *value* of the contributions for which administrative fees are assessed. Another difficulty arises in explaining to planning committees why it is necessary to initially detail as many expenses as possible, at the same time building in flexibility for later. People who don't routinely plan programs typically underestimate costs while overestimating attendance, and therefore revenue. Attempting to communicate these realities while sitting across the table from the director of a large state agency or the president of the company can become awkward at best.

Budgeting is actually about values and resources. As budgets are generated, stakeholders reflect their respective values and objectives through the ways that resources are allocated. As program planners and their clients work through the budget-planning process, goals are balanced with realities, and common ground is negotiated.

For example, a physician wants to plan a program to address the use of magnetic resonance imaging in the diagnosis of cancer. She expects one hundred people to attend; she proposes to market to an audience numbering three hundred. The conference program planner knows that, under typical circumstances, it is unlikely that one third of the people who receive a brochure will register—not unless there are other mitigating factors. Because neither the physician nor her department has the resources to assume risk, any shortfalls must be taken up by the conference program unit. The program planner is expected to plan programs that break even, not to waste departmental resources on programs where solvency is doubtful from the outset.

Through further discussion, the planner learns that this group meets every year at the same time, but on a different topic, and that new state certification requirements can be met through attendance at the program. While one third is still a very large response rate, the planner and the

physician are gradually moving toward mutual agreement through the processes of clarification and negotiation. This part of the process is ripe for conflict, but it is also a critical step and should be taken very early in the planning process.

Assuming and Managing Risk

Whether conference program units are completely self-supporting or partly subsidized, most planners must project and manage risk. In some instances, individual program planners and their activities are looked at as individual "profit centers." Planners must negotiate tough questions with program sponsors; for example:

Who assumes risk and residuals?

Who makes the decisions that influence risk?

How can financial realities be balanced with programmatic needs?

Being Successful at Financial Management

Effective budget negotiation and risk management involve the following "human" steps:

1. Comunicating and clarifying values and goals
2. Developing understanding
3. Developing credibility and trust
4. Developing commitment and ownership

The scenarios outlined in Figure 10 are common in the planning sequence. The instructor (or other faculty contact) and the program planner sit down to draft a budget and find that they come to the process with potentially conflicting values. In this case, the instructor values low cost; the planner, fiscal solvency. In most instances, it is possible to accomplish both goals, but both parties must communicate their respective values as a starting point.

Carrying the example to the next step, our instructor explains to the planner that this group will be reimbursed only partially for expenses and thus cannot attend if the registration fee is very high. In turn, the planner explains the concepts of fixed and variable costs and break-even points. Together they hammer out a plan of income and expenses. It's important to note that this part of the discussion is often characterized by conflict. How we earn and allocate resources reveals what we value, and we will always disagree.

Steps for success	Instructor's perspectives	Planner's perspectives
1. Communicating and clarifying values	Values low registration fee	Values break even of income and expenses
2. Developing understanding	Describes other programs and audiences, along with respective fees	Explains concepts of fixed and variable costs, break-even points; suggests ways to contain costs
3. Developing credibility and trust	Mutually set budget—expenses, fees, and break-even points	
4. Developing commitment and ownership	Identifies other funding sources, articulates value of program	Wants to share risk, strategies from other programs

Figure 10. Common scenarios in the planning process.

When both points of view have been aired and accommodated through negotiation and adaptation, the new financial plan is one that both parties "own" and are committed to operating within. Ideally this discussion has also begun the process of developing credibility and trust, a subtle process that is integral to success. It can be accomplished in many ways. For example, the program planner might pull ideas from other programs, ask about issues that the instructor has not thought of, offer to take some of the financial risk if certain conditions can be met. The instructor may build credibility and trust by being sympathetic and concerned about the financial issues and by understanding how they fit within the total program plan. She can suggest outside sources of funding that might subsidize the program and keep fees low. She can express respect for the program planner and the planning process, rather than reducing it to mundane tasks too cumbersome and petty for her to be bothered with.

In Summary

Anecdotal evidence suggests that the role of educational entrepreneur is often the one that initially attracts people into the planning of conferences and institutes programs. Individuals find it stimulating and challenging to organize, integrate, coordinate, lead, and manage resources. Most planners have created and are simultaneously maintaining many of the "small business ventures" called conferences, workshops, or short courses. Organizational proficiency, management and leadership abilities, and skill at financial planning and negotiation form the foundations of success for the educational entrepreneur.

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Chapter 5
The Program Planner as Builder of Effective Relationships

Chapter 1 The Conferences and Institutes Program Planner: A New Model

Chapter 2 Building on Traditional Bases toward a New Model of Conferences and Institutes Program Planning

Chapter 3 The Program Planner as Organizational Interpreter

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In addition to the roles of educational entrepreneur and organizational interpreter, the program planner is also a builder of relationships and support for conferences and institutes programs. This role is critical. Successful program planning depends on creating and maintaining an effective network of "people" resources. In fact, we often point to this network of relationships in "selling" our services. The following situation may sound very familiar.

- Lynn Dow is a training coordinator for the State Department of Social and Family Concerns. Her current assignment is to provide substance-abuse training to five hundred case workers. The first step in the process is to develop the training curriculum with input from agency staff, substance-abuse experts, legislative officials, as well as representatives from the Department of Psychology at a nearby state university. Where to begin?

  Lynn meets wih her boss and other agency co-workers to discuss in general terms the direction of the training. At that meeting, the group identifies individuals who might participate in the design of the curriculum. They leave that meeting with the understanding that Lynn will convene a curriculum-planning group—easier said than done.

  She begins contacting the targeted individuals. Because they are unaware of the project, she must articulate the needs of the agency and target audience, as well as the circumstances that have converged to bring the training to this point. These are busy people, so taking on new commitments is a tough decision. The way that Lynn presents the issues significantly influences the choice to participate for some. From those who cannot serve, Lynn elicits the names of others who might bring the particular perspectives needed. After many calls, she has developed a core group and can schedule the next meeting.

  A key faculty member from the state university is leaving soon for a month's sabbatical. In order to gain his input, Lynn must schedule the next planning committee meeting before he leaves. Unfortunately the conference room at her office is unavailable for a meeting on the one day prior to his departure that all members are able to attend. Lynn

contacts someone on another floor—the only other potential meeting space in the building. That facility is also reserved, but by a much smaller group.

Through a series of calls and discussions, Lynn is finally able to get that group to meet in a private office, thereby freeing the meeting space. The relationships that Lynn has cultivated with other agency departments, as well as the approach from which she operates, open doors for the curriculum design process.

Lynn's thoughts now move toward maximizing the output of the day. In order to quickly bring everyone up to speed, she decides to prepare a concept proposal. This proposal will briefly outline the issues in the external environment leading to the project, present current trends and future projections of substance abuse in family situations, highlight possible objectives of the training, and outline a proposed logistical plan (including budget) for actual implementation of the workshops.

This sounds good on paper, but Lynn cannot prepare the proposal without input and assistance from co-workers, and there isn't much time between now and the meeting. She must call on her secretary to help prepare the actual document, as well as to contact possible training facilities and vendors. The agency contract writer helps her to think through particulars of the logistics and to prepare a budget. The staff assistant to the director provides statistical data and analyses specific to this issue. When the day of the planning meeting arrives, everything is set for a productive meeting.

Even before the initial planning of the program has gotten under way, Lynn Dow has already made great use of her network of "people" resources. Long before the learners have been notified, registered, lodged, fed, and instructed, the importance of relationships has been demonstrated. The training program will ultimately occur because of the contributions of many people.

The Importance of Relationships

We hear a lot today about the effectiveness of service organizations and the relationship to a customer focus. The essence of a customer focus and service orientation centers on relationships. How do you build good relationships? How do you preserve them? Which relationships are even important?

Judith Ruderman, Duke University, defines a customer as anyone who *buys into* what you do (1989), not just someone who *buys* what you do. In other words, the term *customer* includes anyone whose cooperation is necessary for success. In the planning of conference programs, the cooperation of many customers is essential to success. Critical relationships must be acquired, cultivated, and preserved. These relationships are vital and often fragile.

Types of Critical Relationships

Figure 11 presents three categories of relationships: political, internal, and interpersonal. *Political* relationships can be thought of as those that are tactical or strategic in nature. Relationships in this category are usually external to the organization and are very important in program planning and implementation. Such relationships are well worth the energy devoted to them.

We must not overlook the important relationships that we rely upon within our own ranks. Whether we work with a marketing director, the contracts officer, or perhaps an in-house audio-visual department, *internal*

Figure 11. The program planner as a builder of relationships.

relationships contribute greatly to our effectiveness. While crucial, these relationships are often the last to receive any special nurturing on our part.

Recent organizational as well as popular literature has sensitized us to the importance of good *interpersonal* relationships with co-workers. The very nature of planning conference programs calls for high levels of interaction, cooperation, and teamwork. When time frames get tight and energies are low, healthy interpersonal relationships can make the difference.

Nowhere are relationships more important than in planning conference programs. At times, it seems that a program has come together successfully solely on the basis of the human relationships created and nurtured by the program planner. Let's look at each of the three categories in greater detail.

Political Relationships

Few conference program planners have been successful without calling upon allies—allies carefully cultivated across the company, the agency, the campus, the community, or perhaps the state—depending on the setting in which planning occurs. Political relationships can be thought of as those that are tactical or strategic. The term *strategy* refers to the maneuvering of resources in order to mount an operation. In the planning of conference programs, political relationships ensure the cooperation of the "people" resources necessary for program success.

The term *political* is used here to refer to relationships that are external to the larger organizational framework. Examples of such relationships are presented in Figure 12. These relationships can be found within the outermost circle of the diagram. *Political relationships* also refer to those critical relationships that are outside the program planning department, as well as external to the continuing education or training division, but still within the parent organization. Relationships of this nature are reflected in the next circle.

This first category includes relationships with constituencies that are external to the larger organization, such as the potential audience, government representatives, community and industrial leaders, or potential service representatives and vendors. For example, this kind of relationship often forms between a program planner and a local printer, between industry training coordinators and the local college, or between the health care programmer and the State Board of Nursing.

The second category of relationships are those that are external to the continuing education or training unit, but still within the larger parent organization. In large bureaucratic organizations, these relationships are critical. A quick look at the telephone numbers dialed most frequently by a

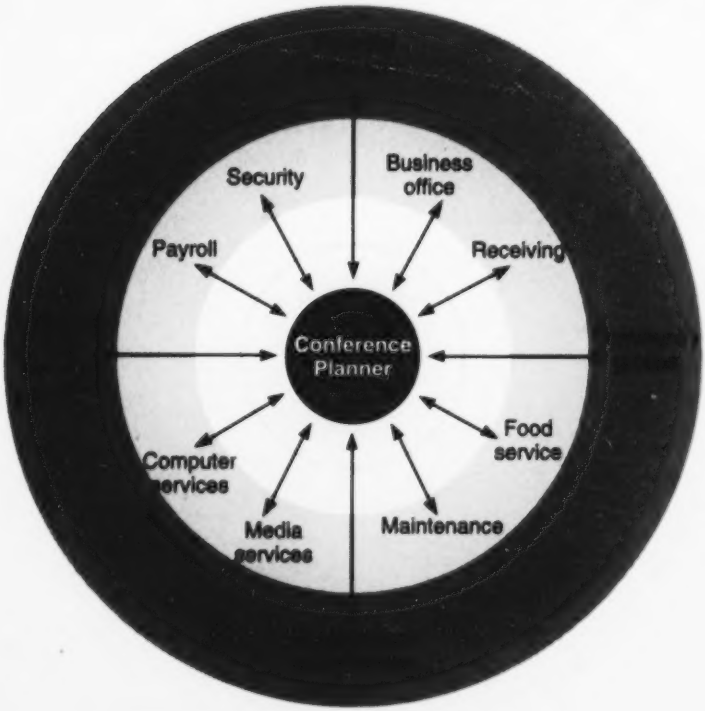

Figure 12. Types of external political relationships.

program planner would probably reveal heavy interaction with other departments internal to the larger organization whose assistance is essential. Such entities provide services that are needed by many departments within the organization, and they complement services provided directly within the program planning unit.

Political relationships influence the flow of information and resources. Strong external relationships help identify needs that might be addressed through programs, as well as enhance the success of programs already in motion. In our opening story, Lynn made effective use of political relationships. Her planning committee was composed of representatives of entities with whom she and her agency had relationships. These important entities bought into her program and will be instrumental to its success.

Political relationships are achieved in many ways. Obviously such relationships develop through standard, everyday business operations. But strategic relationships also develop in less obvious ways—over coffee, in

the softball league, through a regular luncheon group, at important community events. Savvy program professionals are appropriately visible and, where possible, should interact as partners in their organizations and communities.

Internal Relationships

The relationships that fall under the category of "internal" are often the most neglected, and yet they are pivotal. The term *internal relationships* refers to interactions with key individuals in "sister" departments within the continuing education or training unit. Figure 13 illustrates what is meant by this category.

Whether or not these entities are actually found within the continuing education-training unit, or rather within the larger parent organization, will

Figure 13. Types of internal relationships.

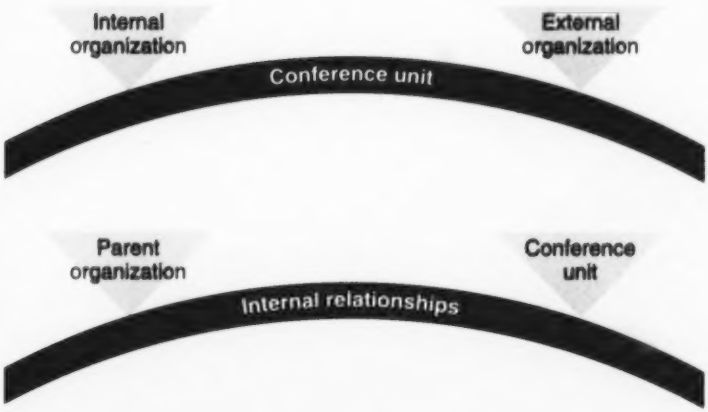

Figure 14. Relationships that serve as bridges between groups.

depend upon the setting where planning takes place and the size and complexity of the program planning unit.

These relationships are particularly important because the individuals and groups involved share an understanding of programmatic concerns and also have important influential contacts within the larger organization. Just as the conference program unit often serves as a bridge between the external environment and the internal organization, internal contacts provide a bridge between the conference program unit and the parent organization (Figure 14).

Interpersonal Relationships

Positive interpersonal relationships with co-workers are a prerequisite to success in planning programs, which calls for high levels of interaction, cooperation, and teamwork (Figure 15). It seems that no matter how thorough the advance planning has been, tight deadlines and "rush" situations cannot be completely avoided. The sheer volume and time demands of programming loads in most settings place a heavy strain on interpersonal relationships. Important aspects of effective relationships include accurate and open communication and mutual respect.

Accurate and Open Communication. Few of us have escaped the ramifications of poor communication. Open lines of communication are essential to program planning. In fact, each of the three categories of roles that have been explored involve effective interaction. The organizational

Figure 15. Interpersonal relationships with co-workers.

interpreter articulates program importance, needs, and goals to internal decision makers, as well as to external constituencies. The educational entrepreneur manages the various temporary planning organizations by keeping information flowing among all concerned. And, of course, positive relationships are built and sustained with open communication and understanding.

Mutuality. The contributions of many people are required to launch conferences and institutes programs, and all contributions should be valued and respected. In the planning of programs, people are interdependent, that is, no one can be successful without the cooperation and assistance of colleagues, support staff, and others. Mutual respect is not tied to rank or status, but to competence and commitment.

In Summary

This chapter has focused on relationships on several dimensions. Relationships with external publics, internal constituencies, service providers, and various levels of support staff and co-workers in general were considered. Effective program planning depends on cultivating and nurturing *networks* of human resources that support the delivery of conferences and institutes programs.

Chapter 6
New Perspectives on the Role of the Conferences and Institutes Professional

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Whether program planning is a full- or a part-time responsibility for the individual, the planner is called upon to play many difficult and challenging roles. This issue of the Guide Series suggests a new approach to a description of the knowledge, competencies, and managerial roles inherent in effective conferences and institutes program planning.

New Perspectives

Throughout the life cycle of a program, planners perform complex roles that require a blending of steps, skills, insights, and understandings. Simultaneously, planners are playing the roles of politician, co-worker, interpreter of missions, statesperson, entrepreneur, and administrator. Those roles fall into three categories: interpretational roles, entreprenurial roles, and relationship roles, as represented in Figure 16. Each of these role categories, as well as the knowledge and competency bases, has been discussed in detail in the preceding pages.

Three Major Themes

In addition to the knowledge and competency bases and the three categories of roles, there are three themes throughout this Guide—connection, collaboration, and credibility—that shed light on the roles of the program planner.

Connecting otherwise "strange bedfellows" is an essential part of our role. This is particularly evident in academic institutions currently seeking to establish relationships with the larger external environment. Conference program planners have long provided such linkages, traveling between both worlds. Modern organizations in many settings increasingly need to develop these linkages, and program planners are already sensitive to both environments.

Collaboration is a critical theme in program planning. Programs typically result from the contributions of many entities. As program planners, we can help assure that collaboration and cooperation take place among those vested groups. The traditional cultural emphases on competition and

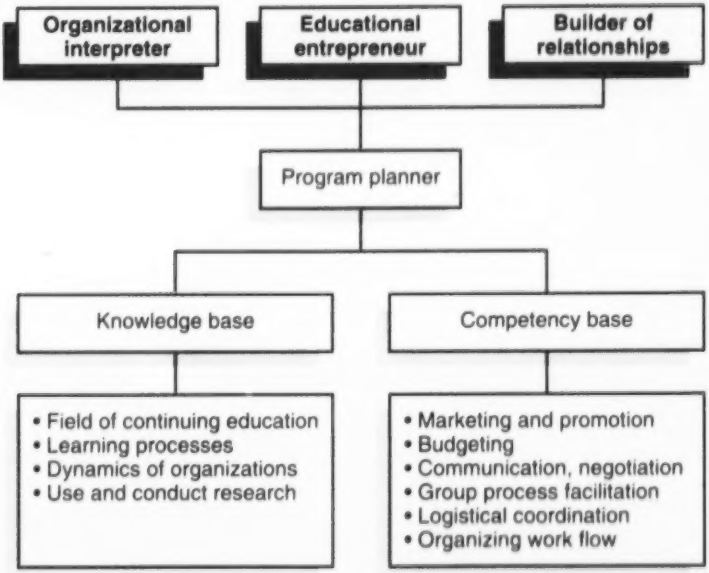

Figure 16. A new model of conferences and institutes program planning.

control have given way to urgent imperatives and new models of cooperation and collaboration in response to the complex problems of our day.

Credibility is hard-won over time and squandered in a moment. Once *connections* are made, the nature of the *collaborations* that build on those associations determine *credibility*. Amid a tightening economic climate and demands for greater accountability, credibility is more important than ever. Program planners are regularly asked to make decisions "of a highly normative nature, particularly with reference to budgets and distribtuion of residuals" (Lipman, reviewers' comments, 1992). Issues of honesty and integrity infuse decision making at all levels.

Implications for the Development of Conferences and Institutes Professionals

As conferences and institutes professionals master the day-to-day specifics of programming, they also mature as interpreter, entrepreneur, and builder of relationships. What can we do to promote this growth and prepare professionals for leadership roles in the future?

1. First and foremost, we must transcend the nuts-and-bolts, skills-oriented way of looking at what conference program professionals do. We must shift our thinking, as well as our speaking, to a broader perspective. When we talk to important constituencies and contacts, we must not trivialize the expertise that we bring to programming. Instead, we must emphasize the roles that we perform in the success of a program. Our promotional materials must carry the same theme.
2. Conferences and institutes professionals must be exposed to the theory and practice of both continuing education and adult learning. There is nothing more practical than good theory. The relevant knowledge base incorporates a perspective on the field of continuing education, as well as an understanding of the learning process and of adults as learners.
3. We need to provide greater exposure for professionals to leadership and organizational theory in general. Highly successful planners have developed an informed understanding of the settings in which they operate and a sensitivity to human behavior in organizations. We must not underestimate the value of a thorough understanding of the milieu in which we operate.
4. We need to provide professionals with outside learning experiences that challenge and broaden their thinking. In the same way that we advocate and actualize ongoing development for our constituencies, we must provide new learning and challenges for conference program professionals.
5. We can seek out opportunities to be key partners in our organizations and in our communities. Let's showcase our talents by volunteering for substantive assignments that go beyond the planning of social events.
6. We can incorporate reading and reflection into staff meetings and other activities. We can support research and writing projects among staff members. We can encourage, or better yet, require graduate study.
7. We can revisit our job descriptions, desired qualifications, and salaries to indicate that we are serious in seeking and developing educators and leaders.

In Conclusion

The forecast for organizations of the 1990s suggests continued tightening of resources, along with increased demand for responsiveness to pressing needs. Conferences and institutes professionals are well accustomed to tightening and relaxing resources as financial outlooks shift. We also boast a fine record in responding to needs in an effective and timely fashion.

Conference program professionals can be valuable players in the unfolding scenario of a learning society, but we must adopt new perspectives toward the planning roles. In addition, we must literally invest in the development of staff members to their greatest leadership potential.

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